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RETAIL OFFICERS' CONFERENCE,  
CANBERRA,  
10<sup>TH</sup>-14<sup>TH</sup> DECEMBER, 1956



COMMONWEALTH BUREAU OF CENSUS AND STATISTICS  
CANBERRA, A.C.T. JANUARY, 1957

RETAIL OFFICERS' CONFERENCE

CANBERRA

10TH - 14TH DECEMBER, 1956





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## RETAIL OFFICERS' CONFERENCE

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### 1. LISTING AND PUBLICITY

Postal Listing. The method of approach adopted by the various States in the briefing of postal officers was outlined to the conference. Besides discussions with the principal Postal Officers in the State it is desirable also to address, as far as possible, district inspectors and city postmen. It was stressed that the P.M.G.'s Department must be given ample notice, and it was suggested that the initial approach to the Director-General of Posts and Telegraphs should be made during January in order that the relisting can occur in April. All Post Offices are to be approached in this Census year irrespective of whether they supplied "nil" returns in the past, as this will ensure that all marginal areas have been covered. It was agreed that it would be desirable to obtain a list showing delivery and non-delivery Post Offices separately. If a post-office is located in an area covered by a letter delivery from an adjacent office, these post offices are not to be circularised. The post office will be asked to include a note for publicity purposes in the Post Office Journal, probably in its March issue.

While it was decided not to request postal officers to list departments of shops leased to other traders (mainly in department stores and supermarkets) retail officers in the various States were requested to maintain a watch in order to discover, if possible, any such cases. Owing to the difficulty involved in making checks, it was decided that further attempts to reconcile new building lists with the R.S. 2 should not be made.

#### Postal Check.

No check on the overall completeness of the postal listing has been made in recent years despite the large and diversified growth that has taken place particularly in fringe-metropolitan areas. To provide some indication of the completeness of the present coverage, it was decided that spot checks should be made. These should be carried out after receipt of the lists from the Post Office in 1957 and without reference to Postal officials. As soon as possible in the year, State officers should forward these lists of post offices (showing number of establishments recorded) to Canberra so that a sample of post offices can be selected and States advised before the listing begins.

Coverage Checks. Apart from a number of checks agreed for individual kinds of businesses (hotels, motors, etc.) there will not be time for extensive checking of lists from other sources. However, these should be made (from Factory and Shops Acts, Associations, etc.) at least once between Censuses.

Description Exclusions. The 1952-53 list of types of businesses which can be excluded from the postal listing will be brought up to date.

Publicity. It was agreed that radio and T.V. publicity should be investigated for the forthcoming Census. The publicity pamphlet used in connection with the United Kingdom Census of Distribution could be photographed and sent to the States for their comment. A publicity statement similar to that prepared in 1952-53 is to be roneoed within the next few weeks.

Traders' Associations. A draft form is to be roneoed and sent to Traders' Associations, preferably at the same time as the manuscript is sent to the Printer so that any useful minor alterations they suggest can be incorporated at proof stage. It was pointed out that Accountants' Associations were not approached during the last Census but it was thought advisable that they should be approached on this occasion. As a list of tax agents appears in the Gazette, it was thought that it may be a simple matter to circularise them, pointing out the aims etc. of the Census.



2. FORMS(a) Main Census Form

Provision for address The requirements of the Elliott addressing machine would need to be taken into account in determining the position of blocks for window faced envelopes. It was also considered desirable that the size of the envelopes should be reduced to prevent any movement of enclosures.

Introductory Letter. The letter was revised to read as follows :-

Dear Sir,

CENSUS OF RETAIL ESTABLISHMENTS : 1956-57

A Census of all Retail Establishments is being taken in respect of trading during the year ended 30th June, 1957. Overleaf is a form requesting details of your retail trading during that year at the address shown above. Please complete and return the form in the enclosed post free envelope, not later than 31st August, 1957.

The three previous Censuses taken in Australia have provided important information regarding the magnitude and nature of retail activities. The present Census will supply similar information as well as a reliable basis for future sample collections which are designed to obtain up-to-date statistics on trends in retail spending. A further Census will then not be required for about another five years.

These statistics are widely used by the business community of Australia. The form has been submitted to retail traders' associations throughout Australia, and, as far as practicable, their suggestions have been adopted.

Some general instructions are shown hereunder and all explanatory notes have been shown next to the questions concerned. Please read these carefully when completing your return. If you have any difficulty in supplying the details requested, please contact my officers at the address or telephone number shown above.

Under the Census and Statistics Act, the Statistician and his officers are sworn to secrecy and are bound under penalty not to reveal to any person, or other government authority whatsoever any particulars supplied in individual returns. This ensures that the contents of your return will be regarded as absolutely confidential.

The response of traders and the assistance given by their associations to previous collections have been most gratifying. As the success of the Census depends on each individual trader, your personal co-operation in completing this form will be appreciated.

A prompt reply will be of great assistance.

Yours faithfully,

(S. R. Carver)

ACTING COMMONWEALTH STATISTICIAN

General Instructions

1. Left unaltered
2. Left unaltered
3. Left unaltered. This paragraph is to be repeated as 5 (b) on page 2.
4. The present wording of instruction number 4 was revised and the whole note transferred to page 2 where it will become 5 (e). In its place, as instruction number 4, the following is to be inserted:-  
"The responsibility for completing this form rests with the proprietor, and not with his agent".



Legal Authority. This was revised as follows. "This return is required under authority of the Census and Statistics Act 1905-1949 and it is COMPULSORY to supply the particulars specified herein. Information supplied in individual returns is CONFIDENTIAL AND FOR STATISTICAL PURPOSES ONLY and will not be disclosed to any person or to any other Government Authority." All States were agreed on the necessity to emphasise the compulsory nature of the collection on the form itself.

1. Name and location of establishment. This was left unaltered except for the addition of the street number of the establishment.

2. Description of Business. It was decided to delete the four notes under this heading, as being unnecessary. This deletion would also make space available for additional questions to be placed on the form if required.

3. Do you normally sell goods at wholesale? This question is to be retained, perhaps as a sub-item in the previous question. It may also help to ask whether any baking or other manufacturing is done at the same location. The desirability of also including a question here on self service stores is to be considered.

Type of organization. This question (as suggested in conference agenda notes) is to be added to the form.

4. Year of Return. The section was revised to read as follows:-

(a) Have you been in business at the address shown on the front page during the whole of the year 1st July, 1956 to 30th June, 1957 ..... (yes or no) If yes give details for that period on pages 3 and 4. In this case do not answer question (b) below.

(b) If you have not been in business at the address shown on the front page for the complete 12 months

(i) State the period for which you conducted this business (.../.../195.. to .../.../195..) and, on pages 3 and 4 give figures for the period stated.

(ii) Please state the name and present address of the previous proprietor.

5. Retail Sales of Goods and Other Takings The instructions formerly shown on page 2 are to be transferred to the top of page 3 and revised as follows:-

(a) Unaltered

(b) If your accounts for the year ended 30th June, 1957 are not made up by the due date (31st August), please give careful estimates in order not to delay the completion of your return. Reliable estimates will be of real value and enable me to gauge trends in retail spending throughout Australia.

(c) Unaltered

(d) Figures for both retail sales and other takings should include cash and credit sales and be stated on a cash selling price basis.

(e) IF ACTUAL FIGURES OF SALES BY THE COMMODITY GROUPS ARE NOT AVAILABLE, GIVE CAREFUL ESTIMATES for each group based on your knowledge of the business or on other information (such as records of purchases made)

States emphasised the desirability of displaying prominently, a note indicating the acceptability of estimated figures. It was agreed to show the first part of note (e) in capitals. This appears immediately above the commodity group details.

#### Part A - Retail Sales of Goods

The £ sign only is to be shown at the head of the column.

The note after the heading "(See instructions at foot of page 2)" will be deleted as the instructions will be printed on the same page.

1. The desirability of inserting "Are these groceries sold on a self-service basis?" is to be considered (an alternative suggestion is to include this under item 2 or 3 on page 2).

2. Unaltered

3. Unaltered

4. To supplement the proposal made by N.S.W. to obtain factory statistics of small bakeries in conjunction with future retail surveys it would be desirable either to add the following questions after this item; "Do you bake any of these at this establishment? Yes or no," or to insert a question along these lines under item 2 or 3 on page 2. These alternatives would be considered when the drafting of the form as a whole was being completed.
5. Unaltered
6. Unaltered
7. Unaltered
8. Unaltered
9. Unaltered
10. Unaltered
11. Unaltered
12. Unaltered
13. Unaltered
14. Subject to further consideration after discussions with the trade, this item should be amended as follows: "Basic Building Materials (e.g. Timber, Roofing Tiles, Joinery, Cement etc.)"
15. Unaltered. It was decided the sales of paint should desirably be included in this item.
16. Unaltered
17. It was suggested that radios, radiograms, television receivers, musical instruments, records and sheet music should be made a separate item. Domestic refrigerators were also considered as a possible further dissection. The views of the trade were to be obtained by State Officers.
18. Unaltered
19. Unaltered
20. This item is to be moved to appear after item 31
- 21-26. Following the heading to items 21-26 it was suggested that the note concerning commission sales as shown on the Retail Survey motor vehicle form should be included. States are to obtain lists of distributor's agents as mentioned in Canberra's memo. of 22nd June, 1956 and to check returns accordingly when received.
21. Unaltered. A total for the firms covered will be obtained but not included in retail aggregates. It would be useful to obtain a reliable total of all firms (including those not at present listed) as a component of capital investment in primary industry. However, as details may be obtained (as for the present tractor distribution collection) it was decided not to attempt to extend the coverage of the retail collection at present.
22. Unaltered. It was pointed out that it had been decided at the 1952-53 Conference to exclude sales of Massey Harris tractors, because their method of selling would include them all in the L.G.A. of the factory. This may need further investigation.
23. Unaltered
24. Unaltered
25. Unaltered
26. Unaltered
27. Unaltered. It was pointed out that the low sales per head in this item for South Australia may be attributable to the widespread practice in this State of distribution being handled by the newspaper printers rather than through newsagents. It does represent sales through retail outlets, and no further action will be taken at present to obtain complete totals.
28. It was pointed out that the wording of this item (i.e. Chemists' Goods) refers to the description of the business rather than the commodities sold. State Officers agreed to approach the trade to discuss a more suitable terminology.



29. Unaltered

30. Unaltered

31. The problem of inclusion of producer goods (i.e. bulk sales to farmers) in this item was discussed and in particular the high per capita sales in W.A. in 1952-53 was pointed out. It was agreed that these bulk sales should be excluded as wholesale sales in principle but comparability with 1952-53 should also be considered in the current Census.

As mentioned above, item 20 "Business machines and Equipment (including commercial refrigerators)" is to be moved down to appear below item 31 and a further item "Other industrial machinery and equipment" is to be inserted as a further purifying item.

32. Unaltered

#### Part B. Other Takings

33. Unaltered

34. Unaltered

35. Unaltered

36. Unaltered

37. This item was amended to read "Meals and Accommodation in Hotels and Motels". However it is not intended to cover unlicensed motels which should be deleted from the R.S.2's before the despatch of forms after checking with licensing lists.

38. Deleted

39. Amended to read "Other takings (such as hire purchase and time payment charges, commission, hiring charges, laundry, dry cleaning etc.)".

6. Stocks of Goods on Hand. The difficulty of including stocks held in retailers' central warehouses was discussed. It was decided that chain stores should be treated as a special case and be asked in a circular for separate figures for warehouse stocks and their location. For establishments other than chain stores the question should be re-worded so as to include stocks of goods on hand held both at the establishment and at a separate warehouse for sale at the establishment.

The method used to some extent in other major countries of collecting all items other than sales on a total distribution (i.e. wholesale, retail and service total) basis was referred to. This is a possible alternative approach which could also be used in Australia and would overcome the difficulty experienced by some traders engaged in two or more of these activities. Such totals would then be published for predominantly retail establishments only. However, the method suffers from the disadvantage that totals obtained for stocks in this occasion would not be comparable with those published for 1952-53. A tabulation was being run from 1952-53 South Australian cards to show the extent of the combined activities and a decision as to which basis should be used was left until this had been examined.

The proposal to obtain estimates of gross margins (which will become possible with the inclusion of a question on purchases) will mean that both opening and closing stocks for the year will be required. Estimates of stocks at the beginning of the year will be available from the September quarter, 1956 survey but to ensure certain comparability it will probably be advisable to ask for this figure again on the Census return.

Because of the uncertainty that is attached to firms' descriptions of their valuation methods, it was decided not to repeat the 1952-53 question on this aspect. Instead it was suggested that a question should be asked on the frequency of the availability of stock figures. This may give valuable information for the future development of stocks series.

No commodity dissection of stocks would be asked for and consequently, if the item is restricted to retail stocks, it will be necessary to exclude stocks of those goods included in the purifying item groups. It was decided not to attempt to specify these exclusions in the item heading but to rely on an office estimation made pro-rata with sales or any other more appropriate basis.

Purchases. The addition of this item to the form was considered desirable but it was agreed that it may be difficult for some firms to differentiate between wholesale and retail purchases, and it was left to the Canberra Office to determine the basis for collection.

## 7. Employment

Employment figures obtained in the 1952-53 Census have not been published owing to the difference in levels shown by the Census on the one hand and the current estimates published from Census and Payroll tax data. There has so far not been any opportunity to make the detailed investigations of these differences. However, it is considered most desirable to publish detailed employment figures which can be related to the other items collected and it is hoped that analysis of the figures will show that those for 1956-57 can be published.

Consideration was given to the complexities caused in 1952-53 in obtaining splits of a number of kinds of businesses (especially garages, bakeries, cafes, and hotels) and the possibility of including those engaged on repair and service activities in particular is to be further examined. If the 1952-53 basis were retained, it was suggested that further itemisation in section A of the question would assist in arriving at the proper retail employment figure.

The employment figures at present being collected on the quarterly Survey return have not been published pending the acceptance of level figures obtained from the Census. In view of this it was decided not to collect quarterly employment figures until the results of the 1956-57 Census have been examined and published.

Wages and Salaries. The conference agreed that it may be preferable to obtain employment figures on a basis adequate for publication before attempting to collect details on salaries and wages.

## 8. Method of Payment

It was suggested that each establishment be asked to dissect total sales according to method of payment, e.g. hire purchase, cash orders etc. in order to indicate proportions and trends in current financing, but it was pointed out that outstanding credit balances (accounts receivable) would be more valuable for National Income purposes. After discussion it was decided that a dissection of either of these items, however, would prove most difficult for some firms and consequently a dissection should not be attempted on this occasion.

For purposes of collecting hire purchase etc. details from retailers, it was decided to include on the form the question asked concerning credit sales on the December Quarter, 1955 Survey form. The replies will be used as a basis for collecting details of hire purchase and time payment for 1956-57 by supplementary collection following the same method as that used in 1952-53.

Additional Service Items. It was decided not to embark on further services items on this occasion owing to the lack of time left for investigation of problems and the smallness of the size of takings of most of the items suggested. However, the idea of covering picture theatres was discussed, but it was thought that the first action should be to find out what statistics were already available. If decided upon, lists should not be difficult to obtain as a list of all theatres would probably be obtainable from an Association, by film distributors or by postal listing. A special form should be considered.

### (b) Forms for Special Descriptions

After discussion it was decided that there should be a special form for hotels but not for garages. The U.L.V.A. in a number of States has indicated that it is in favour of having a special form for hotels. It will be necessary to compile a separate list of hotels as a basis for despatch of special forms.

### (c) Businesses Commencing after June

The suggestion was agreed to, that, where a proprietor commences business after June, a special form should be designed for him to complete, covering sales for a specified month or quarter of the year 1957-58 and also details of employment and stocks at some date during the September quarter, 1957. This information could then be used as a basis for estimating sales during the previous year. The various State officers are to consider the design of this form and advise the number required.



(d) Standard Queries

The States are to design circulars required and send them to Canberra, together with details of the numbers required for printing. These should be sent before the end of February. A register should be kept by State officers showing queries despatched in date order, while the forms under query should be kept in serial number order. This will enable reminder action to be taken regularly.

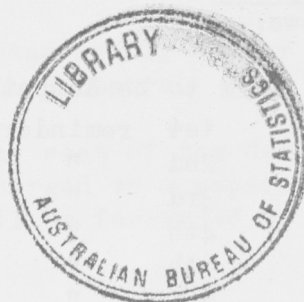
(e) Reminders for Forms

Reminders are to be printed in Canberra and the State officers are to advise the numbers of each required. The wording of reminders was agreed to and the 1st reminder was revised as follows:- "Recently" to be inserted in lieu of "at the end of June," in the first line; and "If correspondence is necessary, please quote the reference number shown on the other side of this card, or enclose this card with your reply", to be inserted in lieu of the last line. This is to be in bold type. The 31st August in the first line is to be altered to 30th August.

The other reminders were left unchanged. A form is to be enclosed with the 3rd reminder provided the staff position makes this practicable.

(f) Reminders for Queries

No standard reminders for queries were designed for use during the last Census, but on this occasion two standard forms will be prepared in Canberra. A copy of the original query should be forwarded with the second reminder, and it may be desirable to prepare 4 copies of the query in the first instance.



### 3. COLLECTION PROCEDURE

Supplies of Forms and Envelopes. The State Offices are to be advised of the quantities of each type being ordered.

Woolworths and Waltons-Sears. These firms have stated that they will co-operate only if all requests are made to their head office. The despatch of returns and all subsequent contact must therefore be made through our Sydney Branch and on no account must other States contact branches of these firms.

Joint Retail - Factory Collection. The suggestion of a joint despatch of Retail and Factory forms contained in Dr. Horner's letter was discussed. The proposed method would complicate the reminder procedure when returns are received for one collection and not the other and in organising a joint querying procedure. Officers in other State Offices had expressed reservations to the scheme and did not wish to adopt it immediately. It was decided that there was a strong case for carrying out the suggestion, which should be attempted as a trial in N.S.W. this year if possible, and further consideration could be given next Census in the light of the experience gained in N.S.W.. However, if other States wish to use it for the 1956-57 Census, after further thought, retail officers should make their services available both in the Census and subsequent sample years.

Survey Informants. It was decided to despatch the June quarter Survey and the Census forms separately, but to enclose with the June quarter Survey form a letter saying that the Census form would be following. A rubber stamp was suggested for use with the first reminder for Survey informants who had not returned the Census form.

Elliott Addressing. The letter on this subject written by Mr. Wright of the Sydney Office was discussed at some length. It was decided that the N.S.W. Office should use its machine for addressing forms etc. for the 1956-57 Census in order to test the value of this method of addressing for future Censuses. South Australia may also use this method if satisfactory arrangements can be made in time. It was decided that it would not be worthwhile for other States to hire machines for the purpose, or to have the addressing done by agents for this Census, pending the experience of the N.S.W. Office. In order to facilitate the arrangement of the library of plates, the N.S.W. Office proposes to use an eight figure serial, four figures of which will indicate the postal area in which establishments are situated. Other States decided not to follow this system while using manual methods. In the Elliott method it is necessary to retain the same number for each establishment from year to year. Splitting of postal rounds may cause some difficulties. In addition, new establishments will tend to be listed out of street order. It remains to be seen how important these difficulties are in practice.

Date of Despatch. The dates of despatch of the Census form and reminders was agreed to as follows:-

Form to be despatched on 8th August for return by 30th August.

1st	reminder on	4th	September
2nd	"	"	24th "
3rd	"	"	9th October
4th	"	"	23rd "
5th	"	"	6th November
6th	"	"	19th "

These are to be considered the latest dates for despatch and Canberra is to be advised of any proposed departure.

Extensions of Time. These can be granted a month at a time up to the end of October. Special cases can be allowed to the end of October in the first instance.

Country Visits. The idea of country visits being made in each State was considered a worthwhile method of increasing response at a later stage in the collection. These visits should be made at about the 90% stage, and prior approval should be obtained for proposed itineraries.

Correspondence and Phone Calls. All correspondence is to be attached to the forms. Correspondence is to be checked every ten days so that reminder action can be taken. Pads of standard forms should be available so that officers taking 'phone calls can keep a note of all calls.



Marking Off. The marking off is to be done with great care in order to avoid any reflection on the Bureau's efficiency.

Checking Name and Location. The importance of checking the address given on the front of the form with that given by the firm was stressed.

Census - Survey Discrepancies. Where there are discrepancies in the Census form as compared with the Survey, these must be taken up with firms before passing the form for punching. The purpose of this check is to establish the correctness of the Census return, and to get the firms to give the correct figures in future surveys.

Rounding. The N.S.W. and Victorian Offices agreed to investigate the worksaving, if any, in rounding figures to £'000 on the forms rather than at a later tabulation stage. The possible effects of rounding are also to be investigated in Canberra.

Small Establishments - Hand Tabulation. Establishments with a total turnover of less than £500 but more than £100 should be hand-tabulated as in 1952-53, with the exception that sales by commodity groups need not be tabulated. Establishments with total sales of less than £100 are to be excluded as previously.

Procedure for Forwarding Returns to Canberra. All States are to send the bundles of forms to Canberra as they are coded, and not to wait until the collection is nearly complete. Individual returns in each bundle are to be added, preferably by machine. South Australia, West Australia and Tasmania are to despatch by air freight; other States are to investigate the comparative costs and delays of air and other transport. The whole of the machining is to be done in Canberra on two new "901" tabulators which are to be reserved for the job, but it may be possible, if necessary, to do preliminary check tabulations for N.S.W. cards in Sydney. It is intended to use the new "555" calculator for the more complicated checking including that concerned with gross margins.

It was pointed out that forms may subsequently be required in the States for checking of duplicates etc. and it was stressed that forms would have to be returned to the States as quickly as possible after punching and balancing.

Only the number of returns in each bundle need be shown on the bundle label (not the value of retail sales as in 1952-53).

In view of the fact that N.S.W. cards will be punched in Sydney, this State will send the cards as well as the forms to Canberra.

Hollerith Cards. The suggestion was made that there should be a separate card for employment, and this is to be considered by the Supervisor of the Mechanical Tabulation Branch.

Progress Reports - Census Progress. These to be submitted weekly as for the previous Census. A form will be designed and printed in Canberra.

Progress Reports - Expenditure. A precise account of the cost of the Census will have to be kept, as the expenditure involved is to be charged to a separate vote in the estimates. A pro forma for four-weekly reports will be forwarded to the States.

#### 4. CODES

Local Government Areas. On the question of L.G.A. coding generally it was decided to use the boundaries as they exist at 1st January, 1957 (any major amendments up to 30th June could be considered later) State branches were asked to forward proposed L.G.A. code lists revised to 1st January. It was decided to use, as far as possible, the same numerical codes as in 1952-53 in order to facilitate checking of the machine tabulations. N.S.W. mentioned that they had been making checks on country towns where shops could be in the town L.G.A. or a contiguous shire. It was agreed that the questions on the form relating to L.G.A. was often useful and should be retained. Shops should be coded to the same L.G.A. as in 1952-53 unless there is strong evidence of incorrect coding.

City Areas. There were discussions on the proposals for city area boundaries and it was considered that amendments were necessary to the areas originally proposed for Brisbane, Adelaide, Perth and Hobart. These amendments were necessary in order to exclude, as far as possible, shops in normal residential areas, so that the areas could be restricted to city "blocks" and comparability between States maintained. As far as possible, the city areas are being made to conform with boundaries of collectors districts used for Population Census purposes.

It was suggested that it may be possible to publish information for four provincial cities (i.e. those with a population of over 20,000 people) as defined for Population Census purposes. However the boundaries of Geelong, Ballarat, Bendigo and Fremantle cut across Local Government Area boundaries and it will be necessary to allocate separate area codes for the establishments involved. The possibility of treating non-municipal towns in the same way was discussed. However, owing to the small number of shops in these towns it would not be possible to publish any details other than total retail sales and consequently it was decided not to take any special action regarding the non-municipal towns.

Description Codes. It was suggested that the description code should be based on wholesale sales where this was the predominant activity of particular establishments, but it was decided to leave this as the most appropriate time would be when wholesale activities are covered as well. The Supervisor of the Mechanical Tabulation Branch suggested that the description codes should be re-grouped, where possible, to coincide with the commodity group codes. This is to be investigated. In addition, it was suggested that some description codes in the miscellaneous group were superfluous and could be deleted. This is also to be investigated.

Size Codes. It was decided that the turnover and employment size codes used in 1952-53 need not be altered for the forthcoming Census.

Category Code. The possibility of further divisions of the category code used in 1952-53 was discussed and it was left to the Canberra Office to decide what basis to use. An example of the possible sub-divisions, is to split predominantly retail firms into, (1) entirely retail, (2) retail with wholesale, and (3) retail with services.

Estimation Code. It was decided to establish an estimation code to enable the effect of office estimations of commodity dissections of sales to be examined. Codes would be provided for "wholly estimated", (perhaps "on basis of a previous return" and "no previous return" separately) "dissection estimated", "part of year estimated" and "no estimation".



## 5. DESCRIPTIONS WITH SPECIAL ASPECTS

Chain Stores. Special action will be required in the case of chain stores -

1. A special letter is to be sent with the June quarter, 1957 Survey form pointing out that Census forms for the year 1956-57 requiring separate details for each branch will be forwarded at the end of July.
2. A covering letter is to accompany the Census returns to request details of stocks held at central warehouses. These figures will be allocated to the largest State store.
3. A double punch will be put in 3rd column of serial number to indicate chain store branches. At a later stage, these cards can be sorted out and the head office chain serial number can be gang-punched on reproduced cards.

Boot and Motor Repairs. The question of the desirability of collecting figures of repair work done by boot repairers and motor vehicle repairers in both the Retail and Factory collections was also discussed. The following results have been obtained for Australia for 1952-53 -

<u>Boot Repairing -</u>	<u>Retail</u>	<u>Factory</u>
Number of Establishments	2,510	1,501
Value of Takings	£4,349,000	£3,298,262
<u>Motor Vehicle Repairing -</u>		
Number of Establishments	6,965	6,252
Value of Takings	£43,757,000	£66,688,166

It was decided that these items should again be covered in the 1956-57 Retail Census and that the coverage of the two collections (and, as far as possible, figures shown on individual returns) should be checked with each other. There are differences between the two collections which definition may account for to some extent. An analysis of the results for 1956-57 should show whether these establishments can be dropped from subsequent Retail Censuses. Dry Cleaning establishments are in a similar situation.

Laundries and Dry Cleaners. It was decided that laundries should again be covered, but that the State Officers should discuss the value of the dissection of dry cleaning takings as shown on the 1952-53 form with the Associations. There may be an advantage in collecting dry-cleaning details again in this Census, checking the totals against those shown in individual factory returns and subsequently relying on the factory figures alone. Lists of laundries should be checked as thoroughly as possible.

Fuel and Ice Merchants. It was agreed that the special approaches made in 1952-53 in order to obtain additional lists of fuel merchants proved inadequate, and the 1956-57 collection should again cover only those provided by the postal listings.

Bakers. Special investigations made in conjunction with the 1952-53 Census revealed few delivery only traders without a shop. However, N.S.W. will re-examine the results of their investigations and take any current action necessary.

Milk. It was not considered practicable to attempt to cover delivered milk for this Census.

Pastoral Companies. Copies of the notes compiled in 1952-53 after interviews with representatives of these types of firms in N.S.W. are to be sent to the State Offices. Using these notes as a basis State Officers should determine which branches of these firms are to be included as making retail sales over the counter to the general public. Where necessary, these firms should be interviewed again to determine the nature of the trading in various branches.

Self-service. Discussions were held with Mr. Stewart of the Prices Branch, and it was decided that in order to identify self-service grocery stores, the question mentioned above concerning self-service groceries should be included on the form. Subsequently, a check could be made against the Prices Branch lists to check the coverage of the Census and the completeness of the lists in metropolitan areas. Mention of a check-out point may have to be included because of the absence of such lists for country areas. Doubt was raised about the suitability of figures on self-service for publication, because of the connection with chain stores, but Mr. Stewart undertook to provide some approximate figures of the chain-store component. If a question was included, it could be either after the grocery sales item or as a part of question 2 or 3.

## 6. COMMODITY DISSECTIONS

Retail-Wholesale Dissection. There was discussion on the problem of what constitutes a retail as distinct from a wholesale transaction, and as to whether some direction should be given on the form.

In general, it was agreed that sales to producers (i.e. "the trade") should be regarded as wholesale sales. In view of this, if firms sell goods in bulk lots (or from separate bulk departments) they should treat such sales as wholesale (regardless of type of commodity involved) and include them in item 33. It was suggested that sales made at trade discounts might also be regarded as wholesale sales to be included in item 33 (regardless of type of commodity) but regard would have to be had to comparability with the previous Census and trade practice. Often firms will have their own definitions of "retail" and "wholesale" sales and generally, it will be satisfactory to accept figures according to the firms' definitions.

Sales of items which are clearly in the category of "producer goods" should be treated as wholesale sales and desirably included in item 33. However, it was impracticable to draw up a list of "producer goods" and the decision as to which items come into this category would, as a general rule, be left to the States.

It was considered that some firms might find it impossible to provide statistics on the above basis, and some sales of "producer goods" and other sales to producers would be shown in Part A of the form. The purifying items: Basic Building Materials; Farm Machinery and Implements, Earth Moving Equipment; and Other Industrial Machinery and Equipment, provide for any sales of some groups of goods which firms may regard as having been made at retail, but which are principally for producer use and consequently will be excluded from tabulations of retail sales. For example, sales of items such as cement, etc. might be classified as retail in a firm's records when sold in small quantities, even if the purchaser is a builder, etc. These goods are virtually being treated as wholesale goods and would presumably have to be added to item 33 if a total of wholesale sales were being obtained.

If the division between wholesale and retail is not readily available, efforts should be made to obtain estimates. However, for purposes of comparability, it will be necessary to watch closely precedents established in previous Censuses and Surveys.

Because of the complexities in the criteria for determining whether transactions are retail or wholesale, and the need for comparability with the previous Census, it was decided that no further instructions should be added to the form.

Estimating Commodity Dissections. After discussing methods used in other countries, it was decided that, as previously, where establishments have a turnover of less than £10,000 and do not show a dissection of their sales by commodity groups, the dissection will be estimated (except in the case of tobacco; see below). The State Offices are to set aside such cases until sufficient numbers of returns showing a dissection are received to use as a basis for estimation. State Officers were asked to advise Canberra of the intended method of estimation before commencing.

Coverage of Tobacco Sales. The possible deficiency of coverage of tobacco sales was discussed, and methods of ensuring a complete coverage were considered. The possibility of checking the R.S.2 lists with lists of tobacco sellers supplied by W.D. & H.O. Wills was raised, but it was decided that the time and effort involved in making the check would not allow it for the next Census - perhaps this check could more profitably be made in the intercensal period. As the Tasmanian Office has already arranged to obtain the lists from Wills, it was suggested that, in view of the small number of establishments in Tasmania, the check could well be made in that State. As an alternative, it was decided that returns from all establishments of a type which normally sell tobacco (i.e. Grocers; Tobacconists; Tobacconists and Hairdressers; Hotels, Wine and Spirit Merchants; Confectioners and Milk Bars; Newsagents and Booksellers; Cafes, Restaurants, etc.) should be queried if tobacco sales are not shown. The usual lower limit of £10,000 will not apply in these instances.

However, the Officer in Charge of the New South Wales Office agreed to contact W.D. & H.O. Wills to discuss -

1. the possibility of obtaining a list of their customers operating businesses of a type not covered in the descriptions specified above.



2. the possible causes of the large differences between estimates of tobacco sales made, on the one hand, by Wills, and on the other on the basis of factory production statistics and Retail Census figures.

Sewing Machines. In 1952-53, sales of sewing machines, wherever shown separately, were included with Other Goods (in particular sales by the Singer Sewing Co. were treated in this way) and similar treatment should be adopted for the forthcoming Census. It is realised that some electrical firms will include sales of sewing machines in Electrical Goods, but this will be accepted.

Unusual Commodity Groups. During the previous Census, the New South Wales Office compiled a list of unusual commodities specified in Item 32. This list will be examined by Melbourne and forwarded to Canberra to assist other State Offices in determining the correct commodity group under which these items should be included.

## 7. STAFFING

A proposed list of staffing requirements was read to the Conference for their information and comment. The proposals were broadly acceptable to all States, but approval would have to be obtained before extras were employed. There would be some latitude in numbers and types of persons proposed in the various States, so long as the total expenditure came within the vote. Overtime should be avoided as far as possible.

## 8. OTHER COLLECTIONS

Retail Sample Procedure. An officer of the Sampling Techniques Branch gave a general outline of the techniques involved in quarterly sample survey, and discussed the investigations to be made to check the accuracy of the sample estimates against the 1956-57 Census results. The possible sources of error are:- bad response, non-response, commodity conversion error and residual error (including sampling error). In order to extract the details necessary to analyse these errors, it was arranged to provide for 1952-53 codes (on a Survey basis) to be punched on the Census card.

This can be done in much the same way as was done in 1952-53. Mr. McCue agreed to provide machine lists in 1952-53 numerical order showing total retail sales, L.G.A. and the Survey size and description. This will be done in January so as to allow the transference of the Survey size and description to R.S.2's and any difficulties resolved early in the year. It will then be a simple matter when forms are received from retailers to insert these codes from the R.S.2's. It will also be necessary on this occasion to provide a sub-universe code which should be inserted in the R.S.2's after they have been checked by the postman. This will show whether the establishment is in the survey main universe, a chain store, or whether a new business or change of description (according to year of commencement or change).

A special treatment will be needed for the new businesses and changes of description for which a year's new business returns have been obtained. In addition, there will be a further two columns which will both be punched x for all establishments, except those in the existing sample. For these sample firms the sample description and size punched in the preceding columns represent the first three figures of the sample serial number and the remaining two figures of this number will be punched in the further two columns provided. This will enable the sample serial number to be shown on the census card and enable each census firm to be identified as in or out of the existing sample.

New businesses and changes of description (not incorporated) fit into the same pattern. The year prefix is provided for in the sub-universe code. The next two figures are the description code. The remainder will be punched x for non-sample businesses. For sample businesses, there is no size code and the third column will be punched x and then the last two figures will be punched in the remaining two columns.

It is proposed that special tables should be run for census-sample analysis immediately after Table I is produced. Once these have been analysed to reveal reasons for major census-sample differences, the census figures can be published in preliminary bulletins before the remainder of the machining is done. When the new sample is selected for September quarter, 1958, a set of the census cards for the new sample firms will be reproduced and these kept separate for sample purposes.

Retail Survey Response Rates. Survey response rates were also discussed. It was emphasised that at least 95% of the returns must be obtained by the six weeks deadline if results are to be published within three months. At present response is well below this figure in all States except W.A.. It could be that an error even up to 5% was being introduced into the final figures for this reason. There is also a demand (particularly from Commonwealth Bank and Treasury) for earlier estimates and it is proposed to reinstitute preliminary estimates (possibly for March quarter 1957 figures). Response for small establishments (perhaps except for the new business strata) are satisfactory for estimates for Australia as a whole without further special action but it would be necessary to ensure that estimates were obtained from large establishments within 3 weeks. Most States advised that contact had not been lost with the large establishments and others that the collection procedure for preliminary estimates could be reintroduced.

On response generally, it was agreed to take all possible steps to reach satisfactory levels. It was left for individual States to devise the best methods to obtain this appropriate to their own State, but in particular it was considered that a special (perhaps personal) approach when forms are being despatched to establishments which had been slow in the past should assist. Police follow-up and periodical visits to country as well as metropolitan areas should also help.

The decision that employment details should be dropped from the Survey form for March quarter 1957 should allow greater time to be given to sales, stocks and hire purchase figures.

The question of rotation of firms was also discussed and it was considered that firms selected should stay in the sample for 4 or 5 years because of the length of time it takes to get them to become regular and quick respondents. However, it was pointed out that small firms were relieved at each Census.

Business Surveys. The current design of the survey and possible future changes were discussed as were the need to obtain returns according to timetable to allow earlier publication of results. For the Capital Expenditure Survey, the difficulty was mentioned of locating new firms which are spending large amounts of money on contract building without themselves employing a large enough staff to have to register for payroll tax purposes. It was mentioned that Building officers in the States would be asked for lists that would assist in the detection of such firms but that the officers dealing with the survey should also watch out for such cases. Opportunity was also taken to discuss the salient features of the Pensions form which is being sent out with the December quarter despatch.

Wholesale Census. The possibility of extending on a future occasion, the Census of Retail Establishments to a Census of Distribution was discussed. The main problem involved would be that of covering wholesale trade. Such a Census, besides revealing the anatomy of wholesale trade, would also provide a framework from which a sample could be drawn and so provide current statistics of the whole field. At present, statistics are available for only those firms paying sales tax and this is a portion which changes with legislative changes. Besides details of sales it would also allow stock statistics to be obtained for all wholesalers. At present partial information only is known from the Business Surveys (which are restricted in scope to the pay roll tax coverage).

One question that would need thought before the following Census would be how a complete list of all wholesalers could be obtained. They include merchants with and without stocks, importers, agents, some manufacturers; some with large establishments, some with no commercial premises at all. The types covered in the 1950 U.K. Census are clearly set out in their report.